

Ref: IDE091019 - LS

Carlton James
Lime Kiln House
Lime Kiln
Royal Wootton Bassett
SN4 7HF

9th October 2019

Dear Sirs

Your Reference:	00820843RJ
Policyholder:	Mithila Rollings-Kamara
National Insurance Number:	JT777218C
Receiving Scheme:	Ideal Urban Living
Trustee:	Whitehall Trustees Limited
Type of Arrangement:	Small Self-Administered Scheme
HMRC PSTR Number:	20001265RZ

We act as a co-trustee and Administrator of Ideal Urban Living.

I enclose our Transfer Discharge Instruction, which has been signed by the policyholder and a copy of our Privacy Notice. This document encompasses the necessary discharge and legal indemnity you require.

I also enclose the following;

- SSAS Definitive Trust Deed and Rules
- Payslip
- HMRC Notification of Registration
- HMRC Screenshot
- Companies House Screenshot
- Authorised Signatory List

Please note all schemes registered after June 2018 have been registered on the new platform as HMRC have updated their system. Therefore, the usual screenshot is no longer available for schemes registered after this date.

Please make a BACS/CHAPS transfer to the account specified on the form.

When making the transfer, please would you also confirm your HMRC Pension scheme Tax Reference Number.

If retirement benefits have been accessed by pension flexibility, please confirm the member's Annual Allowance.

If you have any questions or require anything from us, please let me know.

Yours faithfully,

Elizabeth Senior

Whitehall Group (UK) Limited

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